

**Business Methods**

Search mandatory files for 705 cases and cases cross-referenced in **705 / 2-3**

# SEARCH REQUEST FORM

*Scientific and Technical Information Center*

**Access DB#**

**Request date:**  
Friday, Dec 04  
**Today's date:**  
Wednesday, Dec 30

<b>EXAMINER</b>	<b>Name</b> ROBERT W.	<b>ID</b> 70573	<b>Art Unit</b> 3626	<b>Email</b> robert.morgan@uspto.gov	<b>Telephone #</b> (571)272-6773
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<b>Serial No</b> 09/157,998	<b>Applicant(s)</b> LESSER, RONALD	<b>Filing Date</b> 1998-09-22
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**APPLICATION**    **Title of the Invention:**  
SOFTWARE DEVICE TO FACILITATE CREATION OF MEDICAL RECORDS, MEDICAL LETTERS, AND MEDICAL INFORMATION FOR BILLING PURPOSES

Please perform a **complete prior art** search **limited by** the earliest priority date of **09/22/1998**.

Please **email** search results on/in **email format** to/for **examiner shown above**.

Results are **requested** for the date **Friday, Dec 04**. (SPE Signature required on RUSH orders).

Please also search by:

☒ INVENTOR(s): ☒ ASSIGNEE:

☐ Attached is a copy of the **cover, abstract** and **selected claims** relevant to the search focus described below.

STAFF USE ONLY	Type of search	Vendors and cost where applicable
Searcher	NA Sequence (#)	STN
Searcher Phone #:	AA Sequence (#)	Dialog
Searcher Location	Structure (#)	Questel/Orbit
Date Searcher Picked Up	Bibliographic	Dr.Link
Date Completed	Litigation	Lexis/Nexis
Prep & Review Time	Fulltext	Sequence Systems
Clerical Prep Time	Patent Family	WWW/Internet
Online Time	Other	Other (specify)

Please search for the following:

157. (New) An integrated electronic system for conducting a medical interview of a patient and contemporaneously compiling medical data and calculating an appropriate Evaluation and Management billing code based on that interview, including: electronic means including: a prompting means for generating real-time prompts to prompt an interviewer to make a series of inquiries for eliciting responses from the patient during a patient encounter, said series of inquiries and said responses including at least sufficient details to support billing requirements imposed by payer mandates, said series of inquiries including individual data elements needed to calculate or derive the Evaluation and Management billing code, said prompting means further including: a calculating means for calculating further prompting for inquiries regarding the patient using at least some of the preceding responses;
- a guiding means for guiding the interviewer during said interaction with the patient;
- a reminding means to remind the interviewer regarding specific points of inquiry relevant to further examination of that patient; and
- a soliciting means to solicit underlying information usable for calculating a description of the medical services being provided, said underlying information comprising details of a patient history, details of a patient examination and/or details of medical decision making regarding a patient diagnosis, details of medical tests to describe, diagnose and/or treat the patient, information used for clinical research, information used for quality assurance, and/or information used to compile patient care data base information; the electronic means further including:
- a recording means for recording said responses or other related information corresponding to the series of inquiries; and
- a calculating means using information including said recorded responses to derive the Evaluation and Management billing code, said billing code complying with the billing requirements imposed by said payer mandates.
158. (New) A method for assisting a user in conducting a patient encounter, said patient encounter comprising inquiry, examination, assessment, counseling, or decision regarding said patient, storing data regarding said patient encounter, and generating a billing code based on said patient encounter data, including:
- a prompting means for reminding the user to enter individual data elements, wherein said data elements comprise data needed to indicate the type of patient encounter, to document what was found or what occurred during said patient encounter, or to comply with requirements for
- calculation of said billing code specific for said type of patient encounter; an inputting means for recording said patient encounter data;
- a data storage means for preserving said patient encounter data;
- a calculating means for using said data regarding said patient encounter to derive for the user said billing code, said billing code complying with billing requirements imposed by payer mandates for said type of patient encounter; and
- a data access means whereby items preserved by said data storage means and results of said calculating means can be viewed, analyzed, or revised.
- Keywords:** a calculating means using information including said recorded responses to derive the Evaluation and Management billing code, said billing code complying with the billing requirements imposed by said payer mandates.

Only claims 104-158